
Transmitted by Change No. 1-14

CALCULATION OF PAYMENTS
SA-5300 CALCULATION OF PAYMENTS
RE-ISSUED 4-01-14

I. EFFECTIVE DATE OF PAYMENT

The effective date of the SA/IH payment can **be no earlier than the date of the SA/IH application**, and/or **the date all SA/IH eligibility requirements are met**.

If the applicant/beneficiary (a/b) does not meet all SA/IH eligibility requirements until a later date during the application processing time frame, benefits will be effective on the date that all eligibility requirements are met. Unlike SA for SA facility residents, SA/IH eligibility is not tied to the date the FL-2 is signed. See [SA-5200: Eligibility Requirements, II. Level of Care](#).

II. MAXIMUM MONTHLY PAYMENT

Legislation governing the SA In-Home Program authorizes a maximum monthly payment up to 100% of the payment an a/b would receive if he/she resided in an SA facility and applied for and received the SA Basic rate. The maximum SA Basic payment is \$1,228 (the SA Basic rate of \$1,182 + \$46 personal needs allowance.)

The appropriate payment may be less than the maximum allowable payment, based upon the assessment and service plan completed by the adult services case manager. The adult services case manager will determine the actual amount of the SA/IH payment.

- A. Steps the IMC must take to determine the amount of the SA/IH payment.
1. The SA IMC must verify the SA/IH a/b's countable monthly income.
 2. The SA IMC must calculate the maximum allowable payment (partial payment or full payment as applicable).

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3. The SA IMC must communicate to the adult services case manager in writing, using [Appendix E, SA/IH Program Interagency Transmittal Form](#) the maximum allowable payment amounts for the partial month and ongoing full months as applicable.
 4. The adult services case manager will use this information to assess the SA/IH a/b's financial needs.
- B. Steps the adult services case manager must take to determine the amount of the SA/IH payment.
1. The adult services case manager, after completing the needs assessment with the a/b, will notify the SA IMC using the [Appendix E, SA/IH Program Interagency Transmittal Form](#) of the amount of the SA/IH payment needed, when approving the SA/IH application or at redetermination.
 2. The adult services case manager will communicate the actual approved payment **in writing** to the SA caseworker.
 3. The SA IMC will then key the appropriate payment amount.

Note: The adult services case manager may approve a SA/IH payment less than the maximum allowable payment, but can never approve a SA/IH payment for more than the maximum allowable amount as calculated by the SA IMC.

III. COUNTABLE INCOME FOR CALCULATION OF PAYMENT

- A. When calculating the amount of the SA/IH payment, count only the income of the a/b. This may be a different amount from countable income used to determine eligibility for Medicaid.
- B. The \$20 general income exclusion does apply when calculating the SA/IH Payment. See [Economic Benefits Integrated Eligibility Policy Manual](#) (IEM) for instructions on calculating total countable monthly income (TCMI).

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- C. Do not consider the applicant's income in calculating the partial month payment during the application process.

IV. CALCULATING THE SA/IH PAYMENT

A. Minimum Payment

The minimum SA/IH payment is \$5.00. This is consistent with current SA policy. There can be zero pay recipients in SA/IH. For cases where the payment is less than \$5.00 there will be no payment made, but the SA/IH recipient is eligible for an adult services case manager to be assigned to work with the recipient in maximizing the services he/she receives.

B. Calculating the Maximum SA/IH Payment

The amount of the SA/IH payment is determined by the adult services case manager's assessment of the a/b's needs. However, the payment must not exceed the maximum allowable payment amount, which is based on the a/b's income.

To calculate the maximum SA/IH payment:

1. Compute the a/b's total countable monthly income (TCMI). This is the amount of countable income after all allowable deductions and exclusions. See [IEM](#) for instructions on calculating TCMI.
2. Subtract the a/b's TCMI from the basic SA maintenance amount, \$1,228 (\$1,182 + \$46 personal needs allowance). The remainder is the maximum allowable SA/IH payment.
3. Round to the nearest whole dollar \$.49 or less, round down; \$.50 or more, round up).
4. The result is the maximum allowable SA/IH payment.

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Note: The actual payment may be less than the maximum allowable payment, based on the needs assessment by the case manager.

The SA/IH payment added to the TCMI is the maintenance amount.

Example:

	<u>SSI Recipient</u>	<u>Non-SSI Recipient</u>
SA Basic Maintenance Amt	\$1,228	\$1,228
Subtract TCMI	<u>-\$678</u>	<u>-\$700</u>
Balance	\$550	\$528
Maximum SA/IH payment	\$550	\$528
Round to nearest dollar	\$550	\$528
Maximum SA/IH payment	\$550	\$528

C. Partial SA/IH Payments

If an applicant applies after the first day of the month, or becomes eligible after the first day of any given month during the application processing time frame, the applicant is entitled to a partial payment for that month effective the date of application, or effective the date eligibility began. All eligibility factors must be met.

See the Example below. Do not consider the applicant's income for a partial pay month.

The amount of the SA/IH partial payment is determined by the adult services case manager's assessment of the a/b's needs. However, the payment must not exceed the maximum allowable partial payment amount.

Determine the partial payment as follows:

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1. Determine the number of days in the month of application.
2. Determine the numbers of days of eligibility for the SA/IH payment. This is the number of days in the month minus the date of eligibility plus 1.
3. Divide the SA Basic Rate of \$1,182 by the number of days in the month, and round to the nearest cent. This is the per diem amount.
4. Multiply the per diem amount times the number of days of eligibility in the month.
5. Add personal needs allowance (\$46.00) to the SA Basic rate.
6. Round amount to the nearest dollar for partial month payment.
7. The SA/IH payment added to the TCMI is the maintenance amount.

Example: Application made on Dec. 12

Number of days in month of application (28, 29, 30, 31)	31
Date of SA/IH eligibility	<u>-12</u>
Number of days eligible for payment	19 + 1 = 20
SA Basic Rate	\$1,182.00
Divide by Number of Days in the Month	<u>÷31</u>
Per diem (rounded to nearest cent)	38.129 = 38.13
Multiply by eligible days in the month	X 20 = \$
Total Per Diem for month	\$762.60
Add Personal Needs Allowance	+ \$46.00
Maximum Allowable SA/IH Partial Payment (not rounded)	\$808.60
Maximum Allowable SA/IH Partial Payment (rounded to nearest dollar)	\$809.00

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Note: The actual payment may be less than the maximum partial payment, based on the needs assessment by the case manager.

D. Partial Payment for Change in Living Arrangement

A **beneficiary** may receive both an SA/IH payment and an SA payment in the same month when the eligible individual changes living arrangement.

This may occur when an SA/IH **beneficiary** moves to an SA facility and is eligible for SA. If the **beneficiary** enters the SA facility after the first day of the month, the first SA payment in the facility will be a partial payment. Calculate the partial SA payment following instructions in SA-3220, Budgeting.

This may also occur when an SA **beneficiary** moves to private living arrangement, applies for and is eligible for SA/IH. The **beneficiary** may be eligible for a partial SA/IH payment for the remainder of the month after the 5/10-day period ends. Calculate the partial SA/IH payment following instructions in C., above.

Refer to SA-5200 VI. for eligibility procedures and the need for collaboration in planning when the recipient changes living arrangement.